

**Draft RFP Release Comments
Section C (PWS)
IRS Files Activity**

SEE UPDATED RESPONSES FOR 82, 97, 133, AND 166.

Note: SP = Service Provider

Comment Provided By	Question Number	Page Number	PWS Paragraph Number	Comment	Response
Respondent 1	80			Will the Service Provider have the flexibility to redesign core processes and procedures and implement them as long as performance standards are met?	Yes
Respondent 1	81			Will IRS provide lessons learned regarding past efforts to utilize scanning technology and /or other technological innovations?	No, with the exception of CIS which is still in the pilot phase, IRS scanning experience is dated. No significant technological innovations have applied to files.
Respondent 1	82			What are the long term implications of Electronic Filing and Scanning Technology on the Files operations?	While electronic filing and scanning technology have been shown to reduce the files workload, scanning technology is not required by this solicitation.
Respondent 1	83			Will IRS provide results of "Most Efficient Organization" prior to bid submission date?	No. This acquisition is being conducted under the revised A-76 Circular dated May 29, 2003.
Respondent 2	84		1.3.6	Section 1.3.6 states that workload may be distributed over the sites differently than in the provided workload data. When the Government makes changes to the workload that result in higher costs by shifting work to a higher cost service center, will the contractor be eligible for reimbursement of the differences?	Should workload be distributed to the sites differently than as identified in the RFP, the Government may allow a modification of the resultant contract under the FAR Changes Clause to accommodate significant changes and increased costs to the service provider.
Respondent 2	85		1.3.2/ 1.3.7.2	For the employee roster (1.3.7.2), how long from the time of the new employee's on-site attendance will the service provider have to provide an updated roster? Are rosters required for the phase-in period (1.3.2)?	An updated roster should be provided at the time the employee starts. PWS reviewed does not specify that rosters are needed for phase-in (current requirement is "Ten workdays prior to start of the base period.") however we will add a phase-in requirement.

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Respondent 2	86		1.4.3	The language in section 1.4.3 could cause potential problems for a future contract as it relates to 'the timeframe requested by the COTR'. While we understand the desire for ad-hoc information which inherently requires some flexibility, we would prefer either an exact response time or the word 'reasonable' in the language.	Added language "Ad hoc information shall be provided within 24 hours. The COTR may provide additional time based upon the magnitude or complexity of the request or upon the Service Provider's request."
Respondent 2	87		5.1.2	Is there software (5.1.2) that currently maintains the FLG and location of on hand documents? If so, can you provide details?	FLG preparation does not require IRS-specific software.
Respondent 2	88		5.1.6	Will the Government specify which IRS standards are required for an alternate system? (5.1.6)	Yes.
Respondent 2	89		5.3	What is the breakdown between regular mail and fats/flats/cloth pouches? Are these received directly from the mail providers in standard containers or will the Service Provider receive mail already batched (such as post-COMPS/SCAMPS). (5.3)	Files receives interoffice mail (US Govt. Messenger Envelopes) and administrative mail (boxes, pouches, and regular mail). Files also receives computer runs such as CPs and NRPs, typically sent in bundles on carts. The mail containers are dependent upon the type of receipts and may also vary by site. All regular mail, except for mail delivered directly to Files by UPS or other carriers, is opened by R&C and routed to Files. Files mail is not run through COMPS or SCAMPSs. (Paragraph is 5.4.)
Respondent 2	90		5.4.1.2	When the ACPL adds information, is the resulting report available electronically or just in hardcopy? (5.4.1.2)	All ACPL reports are available electronically. (Paragraph is 5.5.1.2.)
Respondent 2	91		5.4.1.2	Can the run date of the CPL be adjusted to other than Thursday and still have accurate data? If not, can the Service Provider change the day of the week that the data is accurate? Finally, is the CPL output available electronically? (5.4.1.2)	CPL/ACPL is run daily with a weekly cumulative report on Thursday. This cannot be changed. ACPL is electronic, CPL is manual.
Respondent 2	92		5.7.1	Is eStream being used for the remaining services centers for correspondence imaging? Can the implementation of CIS be accelerated? If not, what is the schedule for remaining service centers? Are the Atlanta and Kansas City installations on schedule? (5.7.1)	The same equipment used in the Austin pilot will be used in the other sites. Implementation cannot be accelerated. See schedule below (and updated in PWS).

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Respondent 2	93		5.8.1	Can the Government provide information to bidders regarding current request volumes for the Austin CIS pilot? (5.8.1 for reference, but costing is in Section B).	Anticipated workload is shown in TE 5-001. No new info is available to provide but additional rollout anticipated in 2004 should allow for better figures.
Respondent 2	94		1.5.2.1/ 3.2.1.1	Development of a comprehensive Safety Plan and Program is difficult without access to the current operations. Instead of submitting the Safety Plan with the Service Provider's proposal, can bidders describe their safety plan concepts in the proposal and submit the plan at some point during the Phase-In? Such an approach might mirror the PCS Plan (1.5.2.1 and 3.2.1.1)	The Safety Plan is submitted with the proposal, but a final is not required until 10 calendar days prior to completion of phase-in. Guidance is provided in the text of the solicitation.
Respondent 2	95		3.4.4	Are there any examples of GFE that might be difficult for the Service Provider to return? Specifically, are there GFE pieces of equipment that may require special shipping, packaging, or handling requirements (size, weight)? Will the DGR-designated locations for return be local to the service center? If not, are these shipping costs reimbursable or included in the fixed-price bid? (3.4.4)	Equipment will be returned to the location at which it is used. (GFE will not be available if COCO facilities are used.) It is not anticipated that equipment will be difficult to return. Shipping costs should be included in the fixed-price bid.
Respondent 2	96		5.6.3	Does the Service Provider need to pull information from systems such as IDRS, CFOL, or TRDB to satisfy electronic research? (This would apply to both research and transactions with the Form 5147.) Do any electronic searches require redaction of certain information before it is released? (5.6.3)	Systems the Service Provider may be expected to have access to are listed in Technical Exhibit 5-002. The Service Provider shall follow disclosure guidance specified in paragraph 5.1.4 when releasing information.
Respondent 2	97		3.7.1/4.5.2	Can the Government clarify statements in the PWS regarding transportation, mail, and delivery costs? We are unclear whether all transportation, mail, and delivery costs are the responsibility of the Government. If they are now, in our experience, these are costs that the Government has knowledge of in-house. Will the Government provide estimated costs for these services, by location, based on the workflow contained in the technical exhibits? (3.7.1 compared to 4.5.2)	Transportation, mail, and delivery services will be government-provided only when Government Furnished Facilities are proposed and used. The government will not provide estimated costs for these services.
Respondent 3	98	C-4	1.3.1.2.2	Paragraph references a chart for requirement of full-time dedicated site managers at locations with SPC. Confirm that this is the chart located in Para 1.2.2.1, or provide specific chart reference.	Confirmed. Chart is in 1.2.2.1. (Note to Contracting: This paragraph had a cross-reference to 1.2.2.1 that was broken in the version posted on the Procurement website.)

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Respondent 3	99	C-4	1.3.1.2.3	Paragraph references a chart for requirement of site managers at locations without SPC. Confirm that this is the chart located in Para 1.2.2.1, or provide specific chart reference.	Confirmed. Chart is in 1.2.2.1. (Note to Contracting: This paragraph had a cross-reference to 1.2.2.1 that was broken in the version posted on the Procurement website.)
Respondent 3	100	C-8	1.3.7.2	The hiring process may not permit a full employee roster in time to meet the 10 day requirement. Will the SP be allowed to submit a partial roster of those individuals selected, with updates as the process continues?	Updates will be allowed and expected when new personnel come on board. Information submitted 10 days prior to the start up should be complete to that date and should reflect the staffing that will be used at start-up.
Respondent 3	101	C-13	1.4.3	How does the government define "ad-hoc" as it relates to this paragraph? (Some requests for performance data may be extensive and require lengthy research.)	The Service Provider should be able to provide operation information and status when asked. Requests and time frames would be reasonable and attainable.
Respondent 3	102	C-13	1.5.1	Will service provider be notified in advance of inspection and other related activities?	Inspections may be announced but the SP should anticipate unannounced inspections at the government's option.
Respondent 3	103	C-14	1.5.2	What, if any, safety equipment is currently required of employees performing this function at any of the sites?	There is no requirement for safety equipment. The use of safety equipment will be left to the discretion of the service provider.
Respondent 3	104	C-22	Definitions: Peak	What is meant by the term "peak standard"? Is there a different performance standard for peak versus non-peak times?	Peak is defined in Section C-2. Special peak performance standards are outlined in the PRS in TE 1-001.

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Respondent 3	105	C-28/29	3.4	Will Government still furnish equipment if not in a Government Facility?	No. Section 3.1 states "If the Service Provider alternates worksites, the Government will not provide any property or services." Property is defined as Government-furnished Facilities, Government-furnished Equipment, and supplies, materials, utilities, and services. The exception is the IDRS system, which will be furnished even for a COCO facility.
Respondent 3	106	C-28/29	3.4.1	Will the government allow the SP to move GFE between sites during phase in to make the best use of serviceable equipment?	No, equipment is assigned or leased to the specific site. Such a move would make it extremely difficult to inventory and account for equipment at the end of the contract performance period. Each site should be viewed as a stand alone. The service provider may add equipment as desired.
Respondent 3	107	C-29	3.4.2	Will the government provide a "life end date" for equipment for costing purposes?	Not applicable because equipment is covered. The cost is a wash for both the MEO and outside bidders.
Respondent 3	108	C-30	3.5.1	Will the SP be allowed to propose a physical move within GFF at the start of the contract, with prior written approval for any moves subsequent to initial set up of facilities/space?	All moves within GFF, including those at contract start, require approval of DGR and COTR. Moves will be at SP expense.
Respondent 3	109	C-33	4.4	How will "equal or better quality" be determined?	Government will determine if the products and services are not acceptable or meeting the standards of the PWS. Replacements or substitutes could be compared to existing items.
Respondent 3	110	C-35	5.1.5	Will the SP be required to accompany the shipment of files to the FRC?	No, this is not a requirement of the PWS.

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Respondent 3	111	C-36	5.2;TE 1-001	Customer complaints as a method of surveillance is a subjective measurement. If the SP provides a negative response to a customer, but the response is accurate, will the complaint be counted against the AER for compliance?	No, unless the negative response indicates a violation of performance standards.
Respondent 3	112	TE 1-001		The performance standards do not relate to the referenced paragraph numbers. It appears as if items were added to the Performance Standard column, but not adjusted in the PWS Reference column. Please confirm, and/or adjust.	The PRS posted on the IRS Procurement website is correct.
Respondent 3	113	TE 1-001, C-43	Performance Matrix, 5.8.3.2.2	The number of days allowed for receipt of a source document does not match. Please clarify.	The PWS allows 10 days for receipt; the PRS specifies 13 days for receipt, association, and file. Therefore, the numbers match.
Respondent 3	114	TE-3-001-1		Will UPS or FedEx equipment that is currently utilized at some locations but not owned by the government be available to the MEO?	Yes, this equipment will be made available.
Respondent 3	115	TE 3-001		Are all the copiers solely dedicated to the functions under study or are these shared resources.	Copiers will be dedicated.
Respondent 3	116	TE 3-001-2		SPC is not provided on TE 3-001-2. Does this equipment apply to Andover SPC.	The SPC is specified on the first page of the TE and is Andover.
Respondent 3	117	TE 3-001-17		TE lists Learning Center Station. What is this, and what is it used for?	The one Learning Center station (listed for Cincinnati) has been deleted from the GFE listing.
Respondent 3	118	TE 3-001		Due to the upcoming downsizing of the Memphis SPC, is the equipment list for that location accurate?	Equipment lists are accurate to the date of release of the solicitation. The equipment list will change.
Respondent 3	119	TE-3-002		Does "Square Feet Occupied by Files Activity" include ONLY the square footage to be used to perform the work under this A76 study?	Yes.
Respondent 3	120	TE 3-002		When will the leases expire?	Leasing information including expiration is provided in Section H (H.3) and TE 3-002 for all impacted facilities.
Respondent 3	121	TE 3-003		The lists of supplies (consumable materials) and equipment seems to have identical items, depending upon the site. Is there a standard of what is considered equipment (provided by the government) and what is a consumable? (For example, which list do waste baskets belong on?)	Consumable materials are not listed by site. TE 3-003 is a list of <u>typical</u> on-hand consumable materials and supplies. Wastebaskets are listed in TE 3-001.
Respondent 3	122	TE 3-003-1		Will historical usage levels of the supplies listed be provided?	Actual site level inventories will be determined during phase-in. (Quantity at each site fluctuates and thus cannot be specified.)

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Respondent 3	123	TE 3-003-1		Cleaning supplies are listed but paragraph 1.3.4.1 indicates that janitorial services are provided. What are the service providers responsibilities in maintaining the facilities.	Janitorial services are provided for cleaning of facilities. Cleaning supplies listed are typical every day clean up for employee use if needed (e.g., white board cleaner).
Respondent 3	124	TE 5-001-14		The task titled "Receipt of Incoming Mail" indicates OFP 530 is one of the contributors to this workload. Since OFP 530 is not part of receipt of incoming mail, please confirm whether the workload in this item does include OFP 530, and if so what is the quantity of OFP 530 workload contained?	In 5.4, some sites did not capture receipts for certain programs in function 520. Therefore function 530 and 590 had to be used to capture those receipts. (This applies to PRP pulls for Cincinnati and Tax Relief pulls for Andover.)
Respondent 3	125	TE 5-001-2		Errors and Transport to File Storage indicates "No Workload". Does this mean that these processes have no work associated with them, or that workload data is not available?	Workload is captured elsewhere (under Initial File Receipts). This will be clarified in the TE.
Respondent 3	126	TE 3-0003-2		Copier related supplies such as toner are not listed. Is the SP provider responsible for these costs?	Toner and other copier supplies are consumables and are listed in TE 3-003. Since considered consumables, the SP is responsible for the costs.
Kansas City	128		5.5.1.1 RECEIPT OF LIST	Is the option to use the ACPL due to its availability in all of the sites.	As currently written in PWS, use of ACPL is an option (not required).
Respondent 4	129		5.5.2 TRANSPORT TO FILE STORAGE	The first sentence should include Kansas City. Files are currently transported by AWSS between the buildings as the files function is in a off-site location (Building 41).	Kansas City does not have the same situation. This paragraph discusses the transport of files between buildings once under the control of the Files Activity, not between the SPC and Files Activity.
Respondent 4	130		5.6.2 LOOSE DOCUMENTS	Files does not research loose W-2's. All current year loose W-2's received in Files are forwarded to Accounts Management for research.	The question refers to a site-specific agreement. There is no official agreement between SP and AM. Loose W-2s should be considered as loose documents and researched.
Respondent 4	131		5.8.3.2.2 No Source Document Received	Do current procedures allow a six day timeframe for campus originated transactions and a ten day timeframe for area office originated transactions?	Yes. The solicitation specifies the greater timeframe and standards.

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Respondent 4	132		5.8.3.2.3 No Transaction Record Received	Does Files currently use EONS in addition to IDRS to research whether or not a transaction record is pending? If a transaction record is pending, is the record is printed from EONS; the record cannot be printed from IDRS.	Yes. PWS standardizes the research procedure.
Respondent 4	133	N/A	N/A	<p>This comment is not in response to the RFP – it is in response to the posted comments.</p> <p>Respon.3, N/A, General, Is there current contractor support at any or all of the sites listed in he PWS? Who are the contractors? 1) NO 2) N/A</p> <p>Kansas City currently utilizes contractor support to assist with retirements. The contactors utilized are NAI Personnel, 1725 K Street NW, Suite # 1103, Washington, DC 20036.</p>	This is not a requirement under the Files Activity. Trucking companies are used to transport the material to the Federal Records Centers. The private workforce is procured by the Records Disposition Officer.
Respondent 6	152		5.1.3 Discovered Remittance	“SP shall attach a copy of the front page of return with which the remit was found to F/3244.” This is an additional, unnecessary requirement. A return may not be available in all instances. Preparation of the Form 3244 requires the person completing it to fill in identifying information such as SSN, Name Control, Tax Form/MFT, Tax Period, etc.	Added “if applicable” to the sentence requiring the return to be attached.
Respondent 8	153		5.1.3 Discovered Remittance	Cincinnati Files does not prepare the Form 3244. Form 4287 is prepared and sent to Receipt and Control for their preparation of Form 3244.	In order to standardize processes the 3244 will be used by all sites.
Respondent 5	157		5.4 Receipt of Incoming Mail	Misrouted items that cannot be returned to sender should not be rerouted to Receipt & Control. Research will need to be performed to determine the correct routing. In addition, when misrouted items can be returned to the sender, feedback needs to be provided when the item is returned for education purposes.	Standardized procedure for all sites. SP will have limited research capability.
Respondent 5	159		5.5.1.2 Listing Verification	The ABC code for reinputs/reprocessables is of no significance to Files. We verify that the DLN is on the correct cycles CPL. It is unlikely that this would occur because ISRP must have the ABC code and if it is missing the document is returned to batching prior to entry.	ABC is used by some sites to verify processing. Standardized procedure for all sites
Respondent 5	160		5.5.1.3 Errors	<p>This appears to be the location for an instruction for folders that do not have a DLN written on them. Will the service provider be required to write the DLN on the folder or return it to the SPC?</p>	See current paragraph (as posted on IRS Procurement website) that reads “If the Block DLN is not clearly marked on or is missing from the block control sheet or folder or if several documents within a block have unreadable DLNs, the Service Provider shall return the block to the SPC’s Numbering function.”

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Respondent 9	163		5.5.2 Transport to File Storage	This paragraph is confusing; it is unclear as to what the difference is between Austin/Philadelphia and the other Campuses.	These locations have a separate building where files are received by the Files Activity and the building where they are shelved by the Files Activity. (AWSS is in between two steps of the SP's work. In other locations, once AWSS delivers, the work is not outside the SP's control.)
Respondent 5	164		5.6.2 Loose Documents	Add clarification. These instructions would not apply to returns covered under 5.6.4 paragraph 2 (problem refiles). The IRM contains instructions on what to do with loose W-2s based on the year. What will Receipt & Control do with these loose documents once the service provider returns them?	No change. Paragraph 5.6.4 is referenced which clarifies the difference between 5.6.2. Procedures are for all SP sites and should be followed.
Respondent 8	165		5.6.2 Loose Documents	This is a procedure we currently do not follow. Currently when the loose documents (W2's) are received, they are put in a box and shelved until destruction. The workload exhibit 500.1 reflects no volume for this process.	W-2s should be considered loose documents. Research is required. CSPC is a SB/SE site. They do not process returns with W-2's attached.
Respondent 9	166		5.6.3.1 Request Receipt	"If routing information for the requestor is missing or unreadable, the SP shall place the request in classified trash." There is a concern that this statement may lead the SP to place more than those requests without routing information into classified waste. Past experience proves routing information can be attained through research. It is recommended that the above sentence read as follows: "If after research routing information cannot be determined for the requestor, the SP shall place the request in classified trash."	This section has been reworded as follows: If routing information for the requestor is missing or unreadable the SP shall conduct research prior to placing the request in classified trash.
Respondent 5	167		5.6.3.2 Document Retrieval	Currently we do not notate on the request form "Pulled by DLN only". What is the purpose of this statement?	This comment was repeated from the last version. Same response: No change made to PWS. This is to inform the requester that the SP serviced the request by DLN only and other identifying data didn't match the request.

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Respondent 5	168		5.6.4 Refiling and Filing of Associations and Attachments	In reference to the charge-outs stripped from re-files, why would the Government request these be retained for quality review? We currently perform a "Burn Barrel" review periodically, will this procedure continue? We think Form 2275 should be stripped from the return prior to re-filing. Why are these to be added to the back of the return?	This comment was repeated from the last version. Same response: No change made to PWS. QAE may use charge outs for review purposes. Burn barrel reviews may also be conducted as part of quality assurance. Forms 2275 manual charge out are the only record of the charge out activity. They are retained to maintain the audit trail.
Respondent 5	172		5.7.2 Remittance Search	Form 4442 is used not Form 2275.	This comment was repeated from the last version – see response there. The PWS was already revised. The 2275 still referred to in the paragraph refers to those requests sent to NARA.
Respondent 10	173		5.8.1 Correspondence Imaging System Requests	Correction marked in text – deleted "and" before Accounts Management	Concur, delete "and" before Accounts Management.
Respondent 8	175		5.8.3.1 Receiving and Associating Documents	There is no reference in here regarding the Block Proof Listing (BPL). This is used to check each block of documents received against the BPL to verify receipt of all blocks.	The BPL may not be used by the MEO or outside Service Provider. This is an internal step.
Respondent 5	177		5.8.3.2.2 No Source Document Received	Clarify the instruction to read "Source Document Not Found". "No Source Document Found" will be confused with transactions that are input as "NSD" (No Source Document). We also do not photocopy and send the copy back to the originator. We suggest the instruction should read: "...the Service Provider shall file the transaction record without the Source Document attached."	This comment was repeated from last time. Same response: 1) Changed title of paragraph to "No Source Document Received" and added additional words to clarify requirements. 2) Do not concur with second part of comment. Copy must go back to the originator.
Respondent 7	181		Section 5.8 Other Files Services	RTR is a system that Files uses and it is not referenced in the PWS, CIS Roll-out to Fresno is October 2004 not September 2004	RTR is used in areas out of scope.
Respondent 7	182		TE 3-002	Kansas City (Donna Stevenson) - Donna states KC's information needs to be updated. Under Notes: Currently states "Fall 2007". Donna states it should state "Sometime between November 2006 and November 2007"	Will update technical exhibit.
Respondent 11	205		C-1.4.2.1	Will the SP have to make and document inspections of their work? Will these inspections be available to the GOV COTR/QAE?	SP is free to propose whatever he wants for QC Plan. The plan will be reviewed by source selection and SP will be asked to make changes if necessary during phase-in.

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Respondent 11	206		C-1.3	Section 1.3 recommend quantifying experience in resumes. x years within x years of experience since both the project manager and on site manager report to COTR.	Experience will not be quantified in resumes. Evaluators will consider the length and quality of all experience.
Respondent 11	207		C-1.3.1.6 Hours of Operation	Add text The SP shall ensure that lights and electric powered equipment and HVAC are turned off at the end of normal operations to conserve energy/overtime utilities costs. Utility schedules both normal and overtime shall be coordinated a minimum of 8 hours in advance with local REFM contact.	This will be added to a different paragraph of the PWS. (3.6, Utilities)
Respondent 11	208		C-1.3.7 Key Personnel	Need to cover replacement staff with some qualifications as staff originally proposed.	This is already covered in Section H.13.
Respondent 11	209		C.3.7.4	C.3.7.4 says SP personnel shall CARRY, to wear ID badges. What about keys to building? Maintain files security - sign in/out and badging of visitors?	In addition to saying that SP personnel must carry a badge, we also said "shall ensure that the badge is displayed at all times." We will add "in accordance with local protocol." In 1.5.4, we have "The Service Provider shall ensure that unauthorized personnel do not have access to facilities or documents at any time. The Service Provider shall ensure that all personnel accessing facilities and documents have appropriate identification." The SP will sign for keys as part of GFP.
Respondent 11	210	C-19	C-2	Acronyms RCO for Records Control Officer is used to describe the AWSS operational records management personnel. These individuals should be referred to as the ARM or Area Records Manager.	Concur with suggested change
Respondent 11	211	C-44	C-5.9.2	Should read "...send the original to the AWSS Area Records Manager.	Concur with suggested change
Respondent 11	212	C-44	C-5.10	Should read "...and shall submit the form to the ARM"	Concur with suggested change
Respondent 11	213	C-46		The current revision of IRM 1.15.29 is March 1, 2004	Concur with suggested change